

# Standard Operating Procedures

**Subject:** Form Design and Coding

**Date:** 15Jun2006

**Purpose:** The purpose of this Standard Operating Procedure (SOP) is to define standards for designing and coding forms. “Design” is the choice and wording of items in the instrument. “Coding” is the system whereby a record in a computer data file faithfully represents the result of administering an instrument to a particular subject. Coding includes the assignment of one or more database variables to each item on the instrument and the assignment of numbers or character strings to represent the responses.

**Scope:** This procedure applies to all projects managed and maintained at the FPG Data Management and Analysis Center (DMAC).

**Responsibility:** The authority to design forms and create coding schemes rests with the Principal Investigator, who may delegate it to FPG DMAC programmers. Projects are encouraged to seek input into the design of a new instrument from DMAC.

**Form Design Objectives:** Forms design should aim to achieve the following objectives, balancing any conflicts between objectives:

- Forms should be friendly to their users.
  - Users without specialized training in the instrument require forms that are as clear and as easy to complete as possible.
  - Trained users often prefer more streamlined-looking instruments with more complicated directions for recording responses.
- Forms should strive to enhance clarity and readability.
  - Because the instrument itself is often the primary document for the interpretation of the coding system, directions should be complete and clear while avoiding excessive verbiage and “clutter”.
- Forms should strive to aid in data-entry and maintainability.
  - Data entry may be facilitated by uniquely numbering items, and by including codes directly on the instrument.
  - Data maintainability is enhanced by giving careful attention when creating new versions of an existing form. The ideal goal is to maximize compatibility across different versions of the same form by taking steps such as avoiding excessive renumbering of questions where practicable and preserving compatible codes for choices.

**Coding schemes should:**

- ❑ capture the full meaning of the raw responses, without imposing any implicit interpretations or making unimportant distinctions
- ❑ be consistent with regard to missing, Not Applicable, or Refused responses
- ❑ be compatible with previous or parallel versions of the instrument and anticipate future versions
- ❑ promote consistent collection of data (as for example, all data on *Age* would be collected in the same units)